

Guiding Questions for Workforce Planning

From OMB's April 12 Memo:

- Examine total personnel costs, not just number of employees. Can work be performed at a lower grade level?
- Review organizational design and position structures. Is there inefficiency or duplication of effort, such as in management functions?
- Streamline administrative policy making. Are positions used to recreate or restate agency policies?
- Have technological advances (such as automation) eliminated the need for some positions?

OAR's Suggested Bases for Workforce Reshaping:

- Consolidate positions and/or work units to streamline mission support services.
- Eliminate one type of position in favor of another, assuming that one can rehire: administrative series (EPS, Program Analyst) for professional series (Scientist, Engineer), or mission support (HR, budget, contracts, IT) for line (regulation development, research).
- Eliminate management positions through consolidation of work units or functions.
- Regrade positions downward to reduce payroll costs, assuming that one can rehire.
- Reduce or redirect positions after the more labor-intensive startup phase of a project has ended.
- Eliminate or redirect positions due to changes in program priority.

OHR's Suggested Questions:

Positions - Identification of Key Functions and Skill Sets

- What skill sets are needed?
 - Specifically, what do we need more of (GS series, grade)?
 - Which occupations will be affected by scientific and technological advancements?
 - What opportunities exist for retraining?
- What is being done to achieve efficiencies and become more streamlined that will result in a need for different skill sets?
 - How will technology be used to enhance services provided and create efficiencies for employees?
- What new functions/skills are needed?
 - Specifically, what work do we want to do that is new/different we can't currently do or that reflects a change in requirements?
- What current functions are no longer needed?
 - Specifically, what work do we no longer need to do (or need to do less of)?

- What skill sets are no longer needed or can be reduced?
 - How will work be redefined?
 - Specifically, what can we decide to scale back?

Key Priorities, Initiatives and Other Drivers

- What are the priorities and business processes for my organization?
- Are there other new initiatives or programs to consider or older existing programs that have less relevance that will affect your workforce?
- What scientific or technical advances influence your work and how can they be used to enhance or streamline your efforts?
- What significant demographic issues (internal or external) will affect the demand on your organization's workforce (e.g., the agency's significant numbers of retirement eligible employees, competition for top notch talent especially in cutting edge areas)?
- Does my organization need to undergo structural change so that the workforce can most effectively meet its mission?
- Are the current business processes and organizational structures sufficient for carrying out the key priorities?

Technical Considerations for VERA/VSIP Proposals

- How many positions are we targeting?
- What are the targeted positions (title, series, grade, locations)?
- Why are these positions being targeted (too many of these type of positions, need different skill sets, competency gaps, etc.)?
- What is the maximum number of offers that will be accepted? This will be made based on available payroll and the position reduction goal.
- Targeted positions must be either restructured (e.g., lower grade, new series, new functions) or eliminated.
- Cannot eliminate certain critical positions (Contract Specialist, IT Security).

Process

- Participating office submits proposal to OARM.
- OARM sends proposal to OPM for approval.
- EPA bargains with unions over impact & implementation, particularly tie-splitting criteria, amount of time employees have to respond, when employees must separate, and how EPA decides whose application is accepted (most likely first come, first served).
- Office notifies eligible employees in targeted positions of application deadline.
- EPA receives applications, then notifies accepted employees. Employees will have a certain amount of time to withdraw.
- Employees separate on the date they selected.

Message

From: Monroe, Scott [/O=EXCHANGELABS/OU=EXCHANGE ADMINISTRATIVE GROUP (FYDIBOHF23SPDLT)/CN=RECIPIENTS/CN=E2C66D1CB877417DB50C4F90B30AD2CA-SMONROE]
Sent: 6/20/2017 4:31:51 PM
To: Shaw, Betsy [Shaw.Betsy@epa.gov]
Subject: OAR Talking Points - VERA and VSIP Town Hall Meetings june 22.docx
Attachments: OAR Talking Points - VERA and VSIP Town Hall Meetings june 22.docx

For your review.

Message

From: Monroe, Scott [/O=EXCHANGELABS/OU=EXCHANGE ADMINISTRATIVE GROUP (FYDIBOHF23SPDLT)/CN=RECIPIENTS/CN=E2C66D1CB877417DB50C4F90B30AD2CA-SMONROE]
Sent: 5/31/2017 8:27:36 PM
To: Shaw, Betsy [Shaw.Betsy@epa.gov]
BCC: Kutzke, Julie [Kutzke.Julie@epa.gov]
Subject: Initial notice AA to OAR All~draft.docx
Attachments: Initial notice AA to OAR All~draft.docx; Final Approved VERA-VSIP Announcement LV SSC.docx

Betsy,

My memory is terrible! Last time there were two notices from Janet: the first was a vague, preliminary notice that we planned to participate in Round 2; the second was the official notice. Both went to all hands – there was never a notice sent only to eligibles. It's instructive to read over this second message (attached). Following this precedent it appears we will have to publish to all hands the series and org units involved using a template. If so, it will be important to share the info with ODs beforehand.

A draft initial notice from Sarah is attached. I wouldn't do more than scan it at this time. I'm sure we'll be given a template to follow.

Scott

October 28, 2014

MEMORANDUM

SUBJECT: Voluntary Separation Incentive Payment (VSIP) and Voluntary Early Retirement Authority (VERA) Opportunities

FROM: Janet G. McCabe
Acting Assistant Administrator

TO: All OAR Employees

I am pleased to announce that the Office of Personnel Management (OPM) has approved our request to offer VSIP (also known as buy-out) and VERA (also known as early-out) opportunities. As our organization implements various workforce planning efforts, we want to take advantage of these and other flexibilities and tools to help ensure that our workforce possesses the mix of skills most appropriate for carrying out our mission.

In accordance with statute and regulations, we identified for OPM the specific grades, occupational series, and geographic locations designated for VERA and VSIP, and we have received approval from OPM for the categories identified in Attachment A. The total number of VSIPs offered will be thirty nine (39). If the number of applications received exceeds the total number of VSIPs we can offer under one of the categories identified in Attachment A, approvals will be based first on service computation date (SCD) for leave, then on entry on duty (EOD) date - EPA years of service. If the SCD and EOD dates are the same for two eligible employees, then the offer will be granted to the employee who submitted his or her application first. Attachment A also shows the maximum number of applications that will be approved by organization, grade, occupational series, and geographic location, as applicable.

You can find basic eligibility criteria for VSIPs and VERAs in Attachment B. The Las Vegas (LV) Human Resources Shared Service Center (HR SSC) can provide you with more information about VSIPs and VERAs, as well as benefits and retirements, and can assist you with retirement annuity estimates. Attachment C provides a list of your LV HR SSC contacts. In addition, you are encouraged to review your electronic Official Personnel File (OPF) prior to submitting an application to ensure that all information is accurate.

If you decide to apply, you should do so early in the application period, which opens on October 28, 2014, and closes at 11:59 p.m. Eastern time on November 18, 2014. Applications will be accepted during this period using the [**HYPERLINK** "<http://intranet.epa.gov/rtp/2015buyout/>"]. Specific instructions on how and when to apply are in Attachment D. If your application is approved and you decide to proceed with VERA or VSIP, you must depart during the separation window which ends on January 9, 2015. If you decide to withdraw your application, you must do so by January 8, 2015.

If you do proceed with VERA or VSIP, before leaving the Agency you are required to ensure that records for which you are responsible are identified and stored in a record keeping system or transferred to your supervisor or successor. If you have any questions about your records management responsibilities, please contact your [**HYPERLINK** "<http://www.epa.gov/records/contact.htm>"].

The decision to take advantage of a VERA or VSIP is **entirely voluntary**. This is a very personal decision. No one will be pressured to submit an application, and no one is required to accept an offer. You are urged to carefully consider the information provided and your personal situation prior to making a decision.

We will continue to provide anyone considering this decision with useful information and expert contacts. We plan to use all flexibilities and tools available to help OAR most effectively support both individual employees as well as the agency's strategic mission.

Thank you.

Attachments

APPROVED EMPLOYEE CATEGORIES FOR VERA AND VSIP

OFFICE OF THE ASSISTANT ADMINISTRATOR

OFFICE/ LOCATION	POSITION TITLE	SERIES	GRADE(S)	TOTAL TARGETED POSITIONS	MAXIMUM # OF BUYOUTS TO BE OFFERED
OAR/OAA Washington DC	Misc. Admin & Program	0301	11	2	12
			12	1	
			13	1	
			15	8	
	Misc. Clerk & Assistance	0303	5	1	
	Secretary	0318	8	1	
	Mgmt/Program Analyst	0343	12	2	
			13	11	
			14	4	
			15	9	
	Mgmt & Program Clerical & Assistance	0344	8	1	
TOTAL 0301 POSITIONS				12	
TOTAL 0303 POSITIONS				1	
TOTAL 0318 POSITIONS				1	
TOTAL 0343 POSITIONS				26	
TOTAL 0344 POSITIONS				1	
				Total Targeted: 41	Max VSIPs :12

OFFICE OF ATMOSPHERIC PROGRAMS

OFFICE/ LOCATION	POSITION TITLE	SERIES	GRADE(S)	TOTAL TARGETED POSITIONS	MAXIMUM # OF BUYOUTS TO BE OFFERED
CPPD MOS Washington, DC	Mgmt/Program Analyst	0343	13 14	3 1	7
SPD IO Washington, DC	Mgmt/Program Analyst	0343	12	1	
CAMD IO Washington, DC	Environmental Protection Specialist	0028	12	1	
	Mgmt/Program Analyst	0343	13	1	
	Environmental Engineer	0819	13	1	
	Physical Scientist	1301	14	1	
CCD IO Washington, DC	Program Analyst	0343	12	1	
CCD MOS Washington, DC	Mgmt/ Program Analyst	0343	13 14 15	2 1 1	
TOTAL 0028 POSITIONS				1	
TOTAL 0343 POSITIONS				11	
TOTAL 0819 POSITIONS				1	
TOTAL 1301 POSITIONS				1	
				Total Targeted: 14	Max VSIPs :7

OFFICE OF RADIATION AND INDOOR AIR

OFFICE/ LOCATION	POSITION TITLE	SERIES	GRADE(S)	TOTAL TARGETED POSITIONS	MAXIMUM # OF BUYOUTS TO BE OFFERED
ORIA/RPD Washington, DC	Environmental Protection Specialist	0028	13 14	2 1	2
	Mgmt/ Program Analyst	0343	13 14 15	4 3 1	4
	Environmental Engineer	0819	13 14	1 1	1
ORIA/IED Washington, DC	Environmental Protection Specialist	0028	11 13 14 15	1 1 4 1	7
	Mgmt/ Program Analyst	0343	13 14	4 7	
	Mgmt & Program Clerical & Assistance	0344	9	1	
ORIA/NAREL Montgomery, AL	Mgmt/ Program Analyst	0343	13	1	1
ORIA/NCRFO Las Vegas, NV	Environmental Protection Specialist	0028	12 13	2 6	2
	Physical Scientist	1301	13 14 15	4 2 2	3
TOTAL 0028 POSITIONS				18	
TOTAL 0343 POSITIONS				20	
TOTAL 0344 POSITIONS				1	
TOTAL 0819 POSITIONS				2	
TOTAL 1301 POSITIONS				8	
				Total Targeted:	Max VSIPs :20
				49	

**VOLUNTARY SEPARATION INCENTIVE PAYMENT (VSIP) AND VOLUNTARY
EARLY RETIREMENT AUTHORITY (VERA) ELIGIBILITY**

NOTE: This chart is intended to provide information about general eligibility. If you have any questions about whether or not you meet any of the criteria, you should apply, so the Human Resources Shared Service Center can make an official determination.

You ARE eligible for a VSIP if you:	You ARE eligible for VERA if you:	You are NOT eligible for VSIP if you:
are serving under an appointment without time limitation	meet the minimum age and service requirements: - at least age 50 with at least 20 years of credible federal service OR - any age with at least 25 years of creditable federal service	are a reemployed annuitant
have been currently employed by the federal government for a continuous period of at least three years	have been continuously employed by the Agency for at least 31 days before the date your region or program office initially requested OPM approval for VERA	have a disability such that you are or would be eligible for disability retirement
are serving in a position covered by your region or program office's VSIP offer	are serving under an appointment without time limitation	have received a decision notice of involuntary separation for misconduct or unacceptable performance
apply for and receive approval for a VSIP from the Agency	have not received a final removal decision based on misconduct or unacceptable performance	have previously received a VSIP from the federal government
separate by January 9, 2015	are serving in a position covered by your region or program office's VERA offer	performed service during the 36-month period preceding the date of separation for which a student loan repayment benefit was paid or is to be paid
	retire under the VERA option during your program or region's VERA window	performed service during the 24-month period preceding the date of separation for which a recruitment or relocation bonus was paid or is to be paid
		performed service during the 12-month period preceding the date of separation for which a retention bonus was paid or is to be paid

POINTS OF CONTACT

If you have questions about retirement and benefits or general questions about VERA and VSIP, please contact the Las Vegas Human Resources Shared Service Center (HR SSC) as shown below. You may also contact the LV HR SSC if you have questions about FHR Navigator (the on-line retirement annuity tool) or wish to have a retirement estimate prepared.

Email: [**HYPERLINK "mailto:Jimenez.Elaine@epa.gov"**]

Please include VERA/VSIP Request in the Subject Line

Or

Telephone: 702-798-2402

If you have specific questions about the Office of Air and Radiation's VERA or VSIP package, please contact Scott Monroe at 202-564-1271 or [**HYPERLINK "mailto:monroe.scott@epa.gov"**].

HOW AND WHEN TO APPLY FOR VERA AND VSIP

Before You Apply	<p>Read the memorandum from your region or program office announcing the VERA and VSIP. You should ensure that you are in an approved employee category by reviewing Attachment A. If you are interested in the VERA or VSIP but are unsure about your eligibility, you should apply during the application window, so the Human Resources Shared Service Center (HR SSC) can make an official determination.</p>
Where to Find Additional Information	<p>The Office of Personnel Management has information on its website regarding [HYPERLINK "http://www.opm.gov/policy-data-oversight/workforce-restructuring/voluntary-early-retirement-authority/"] and [HYPERLINK "http://www.opm.gov/policy-data-oversight/workforce-restructuring/voluntary-separation-incentive-payments/"]. You may also view frequently asked questions at [HYPERLINK "http://intranet.epa.gov/policy/buyouts/index.htm"].</p> <p>If you need additional information, please call or email the LV HR SSC point of contact identified in Attachment C.</p>
Estimating Retirement Pay	<p>The [HYPERLINK "https://fhrnavigator.com/frbweb/logon.do?operation=index&client=EPA"] allows you to estimate your basic annuity. Instructions on how to use the FHR Navigator can be found at [HYPERLINK "http://intranet.epa.gov/policy/buyouts/index.htm"].</p> <p>If you would like to discuss your estimated annuity or other benefits or if you would like to have the LV HR SSC run an estimate for you, please call or email the points of contact identified in Attachment C.</p>
Application Window	<p>The application window (the time during which you must apply for a VERA or VSIP) opens October 27, 2014 and closes at 11:59 pm Eastern Time on November 17, 2014. Applications submitted after 11:59 p.m. EST, November 17, 2014, will not be considered.</p>
Application Process	<p>Step 1: Go to the electronic application form at: [HYPERLINK "http://intranet.epa.gov/rtp/2015buyout/"]</p> <p>Step 2: Complete your application form and press submit when you have fully completed all of the blocks. If you need assistance completing the form or if you require an alternative text format, please contact the LVHR SSC as identified in Attachment C.</p> <p>You should apply early in the application window in case you experience any problems or issues in applying.</p> <p>Step 3: You will receive an email notification when your application has been received by the HR SSC and your region or program office.</p> <p>Step 4: If you haven't already run your retirement estimate or haven't had the HR SSC complete an estimate for you, please follow the instructions in the box above on Estimating Retirement Pay to obtain an estimate.</p>
After You Apply	<p>The LV HR SSC will review your application and notify you of your eligibility. You should receive a notification NLT December 17, 2014. If you are eligible and your application is approved, the LV HR SSC will ask you to complete the necessary paperwork to process your separation.</p>

Initial Notice from Sarah to All Hands – June 2017

Dear OAR Employees:

As reported by Acting Deputy Administrator Mike Flynn on June [X], EPA has decided to request permission from the Office of Personnel Management (OPM) to offer separation incentives, or early-out/buyout, in fiscal year 2017. The Office of Air and Radiation will participate in the agency's proposal if it is approved.

Under a voluntary early-out (i.e., Voluntary Early Retirement Authority or VERA) initiative, employees may retire who have not yet reached their minimum retirement age but meet other eligibility requirements. Under a voluntary buyout (i.e., Voluntary Separation Incentive Payment or VSIP), a lump-sum separation payment is offered to employees in specific job series in specific organizational units. VERA and VSIP may be used separately or in combination in order to achieve workforce goals.

VERA and VSIP may be used when agencies determine that it is possible to achieve their goals more efficiently and effectively by reshaping their workforce in targeted ways. OAR's senior leaders considered very carefully whether the use of voluntary retirement and separation incentives would better position us to meet our near-term and future work demands, independent of any particular budget scenario. We did identify some positions across OAR that could be restructured or eliminated if the incumbents separated. These positions are in the occupational group for general administrative, clerical, and office services.

EPA's VERA/VSIP proposal must be approved by OPM before the options may be offered to employees. After OPM's approval we will be able to share with you more specific information about the number and location of eligible positions and the number of buyouts that will be offered. This notice will include instructions for any eligible employee who volunteers to accept the buyout. In the meantime, if you have questions about EPA's or OAR's activities related to VERA/VSIP proposals, please talk with your supervisor.

OAR has taken a number of steps in recent years to work more efficiently in service to our vitally important mission of clean air and radiation protection. I appreciate your continuing dedication and support as we strive to maintain our high level of performance.

Sarah Dunham